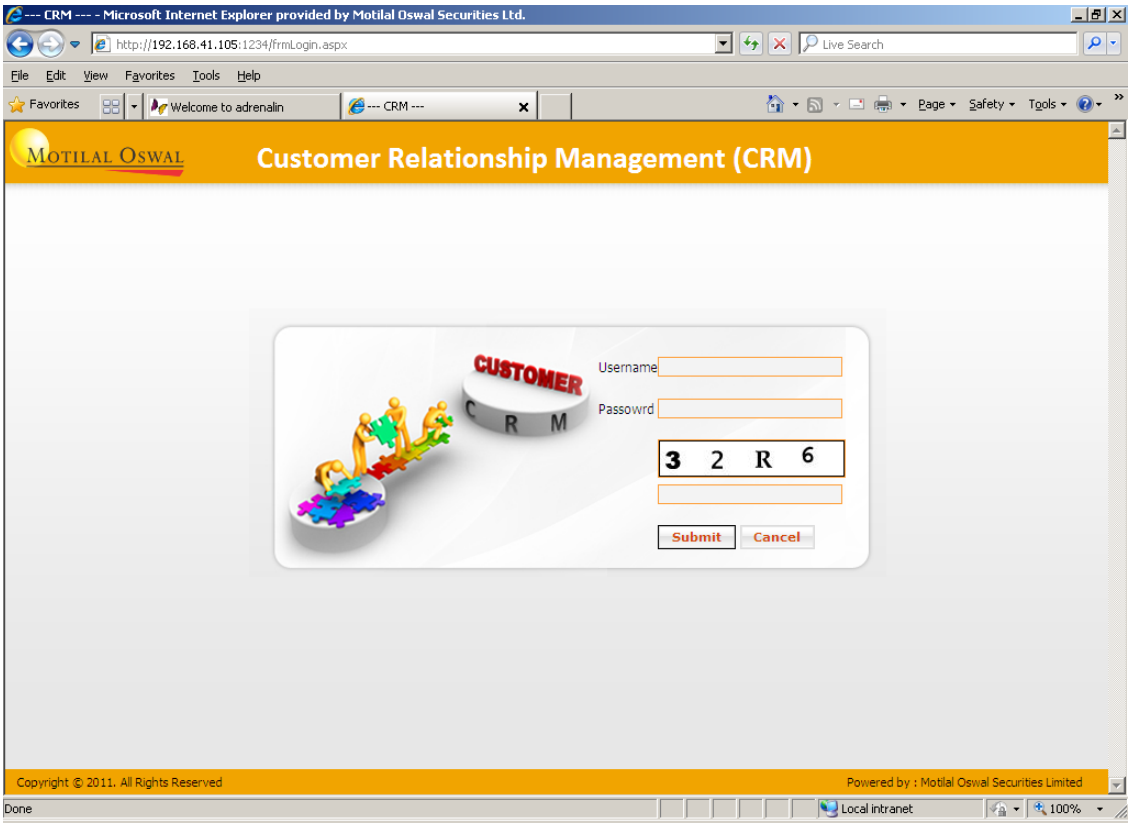
BAG CRM User Manual version 1.0



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1. Introduction

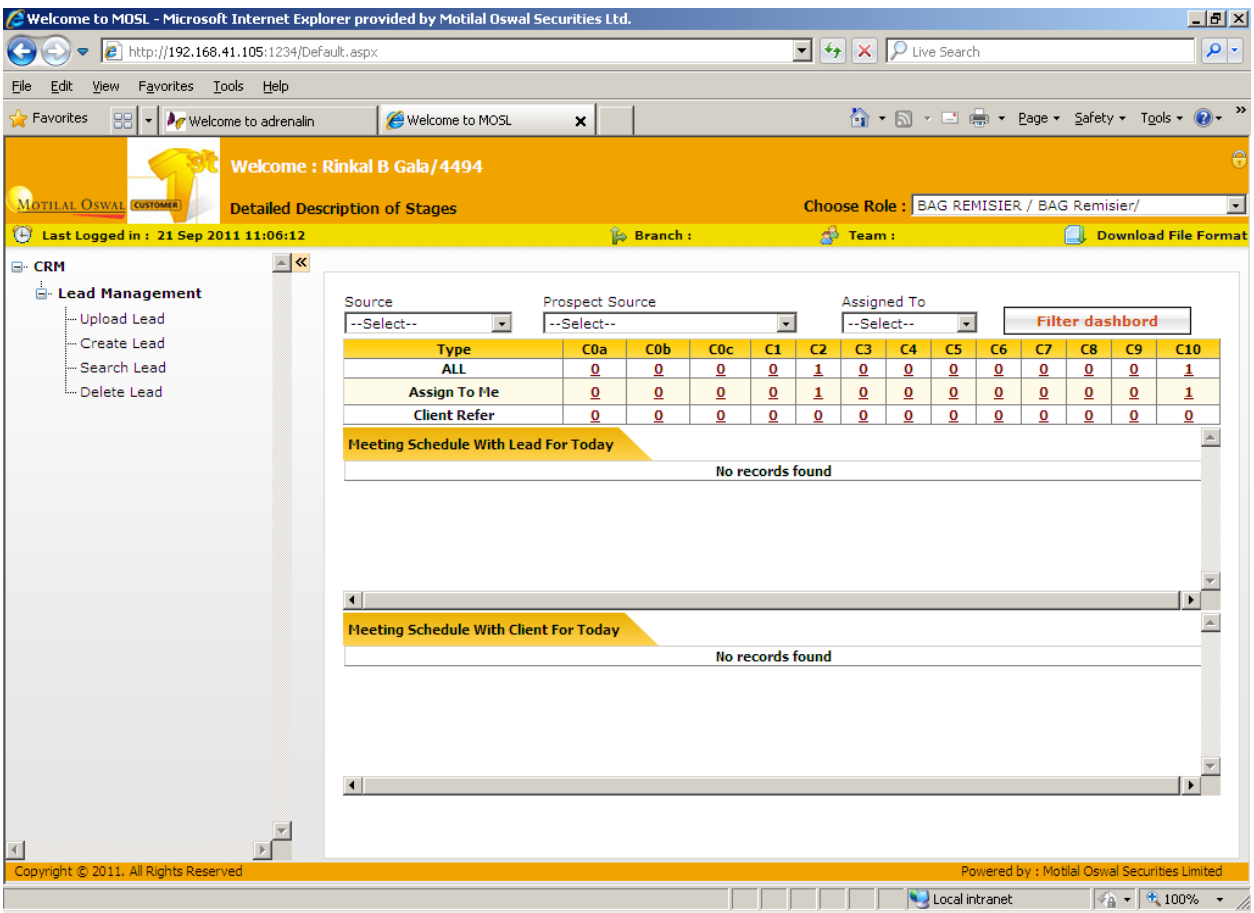
This CRM application is a user friendly application designed to perform lead management activities, view details of existing clients and reports related to these activities. Below is the view of dash board which displays your name, your own branch code, your role in the system, detailed description of all the stages defined and a summary of leads assigned to you and All, grouped stage wise.

The functionalities/access rights may vary based on user roles; hence the view for dash board may also vary.

Franchisee / Remissier owners have rights to access whole application. A Franchisee / Remissier owner can create either admin users or application users in the system.

Admin Role users have access for Upload Lead, Create Lead, C1 Stage Report, Viewing and editing all leads belonging to the Franchisee / Remissier.

Application User Role users have access for Upload Lead, Create Lead, edit leads only assigned to them and C1 Stage Report (see reports section for detailed explanation on the contents of this report).


Welcome to MOSL - Microsoft Internet Explorer provided by Motilal Oswal Securities Ltd.
http://192.168.41.105:1234/Default.aspx
Welcome : Rinkal B Gala/4494
Detailed Description of Stages
Choose Role : BAG REMISIER / BAG Remisier/
Last Logged in : 21 Sep 2011 11:06:12
Branch :
Team :
Download File Format
CRM
Lead Management
Upload Lead
Create Lead
Search Lead
Delete Lead
Source
Prospect Source
Assigned To
--Select--
Filter dashbord
Type C0a C0b C0c C1 C2 C3 C4 C5 C6 C7 C8 C9 C10
ALL 0 0 0 0 1 0 0 0 0 0 0 0 1
Assign To Me 0 0 0 0 1 0 0 0 0 0 0 0 1
Client Refer 0 0 0 0 0 0 0 0 0 0 0 0 0
Meeting Schedule With Lead For Today
No records found
Meeting Schedule With Client For Today
No records found
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2. Stages of Lead Management

Stage	Status Name
C0a	Data upload
C0b	Lead allocated by Telecaller
C0c	AM confirms the meeting/appointment
C1	First Meeting Done/Follow up
C2	Rejected
C3	Deal Done/Client Agrees to start business in few days.
C4	Documentation Started
C5	Sign Off Done at HO/Back-office code generated
C6	First Trade Done
C7	Top 20 A/Cs opened
C8	50% business as per PACR shifted
C9	90% business as per PACR Shifted
C10	Other Brokers Business Shut-down i.e. 100% brokerage as per PACR shifted

C0a: This is the initial stage when leads are uploaded or created manually.

C0b: This is the stage where lead is allocated by Telecaller.

C0b: This is the stage where AM confirms the meeting/appointment with the lead.

C2: Leads those are Not Interested/Rejected while processing must be moved to this stage.

C3: Leads for which Deal Done/Client Agrees to start business in few days must be moved to this stage.

C4: Leads for which Documentation have been started should be moved to this stage.

C5: Leads for which Sign Off Done at HO/Back-office code generated must be moved to this stage.

C6: Leads for whom first trade has been done must be moved to this stage.

C7: Leads for whom Top 20 A/Cs has been opened must be moved to this stage.

C8: Leads for whom 50% business as per PACR shifted must be moved to this stage.

C9: Leads for whom 90% business as per PACR shifted must be moved to this stage.

C10: Leads for whom 100% business as per PACR shifted must be moved to this stage.

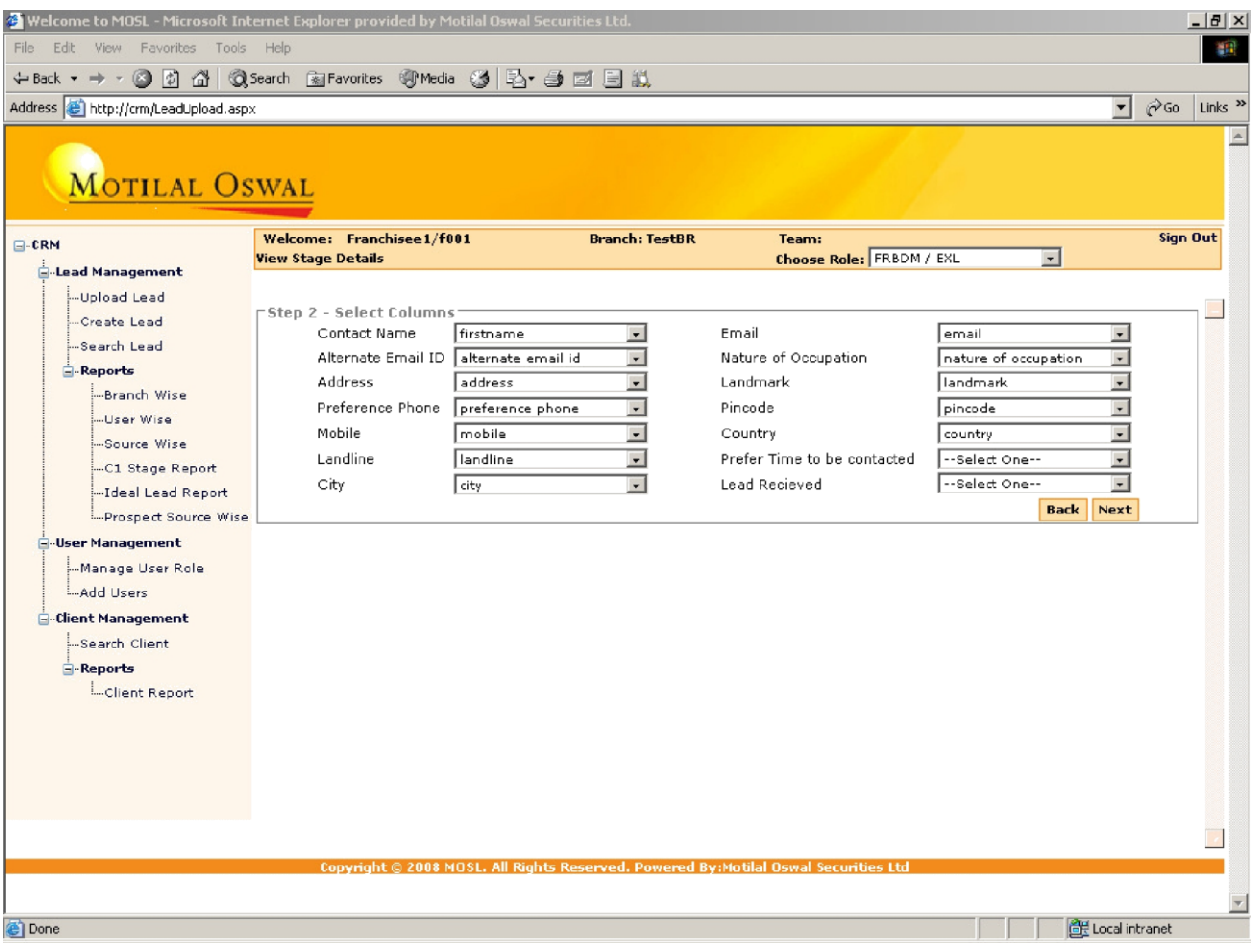
3. Functionalities of Lead Management

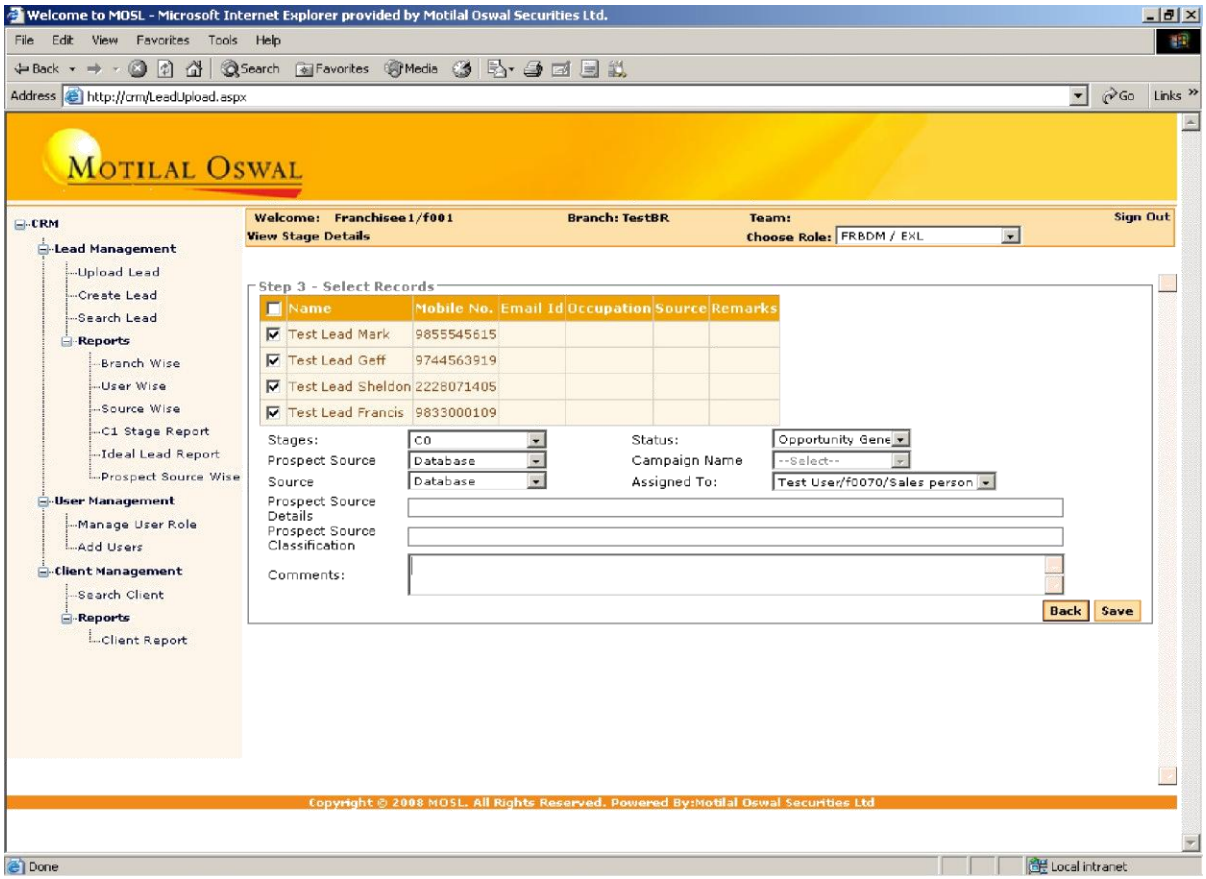
3.1. *Lead Management*

This link provides the users the functionality to upload, create and search leads. The link named "reports" shows the user the list of some predefined reports available to that user. A detailed explanation of the reports available is covered separately below.

3.2. *Upload Lead*

Excel file which includes Name and either landline number or mobile number or email address columns should be used for uploading leads in bulk. The fields that an excel file can contain in addition to the Name and contact details of the leads can see in the screen shot below. However, these fields are not mandatory for the leads to get uploaded into the system. On attaching the excel file, the next screen asks the user to map the column headings of the excel file to the fields in the system. See screen shot below.





Next, is to set value for Stage, Status, Assigned To, Source, Prospect Source, Campaign Name, Prospect Source Details, Prospect Source Classification and Comments of the leads marked in check box.

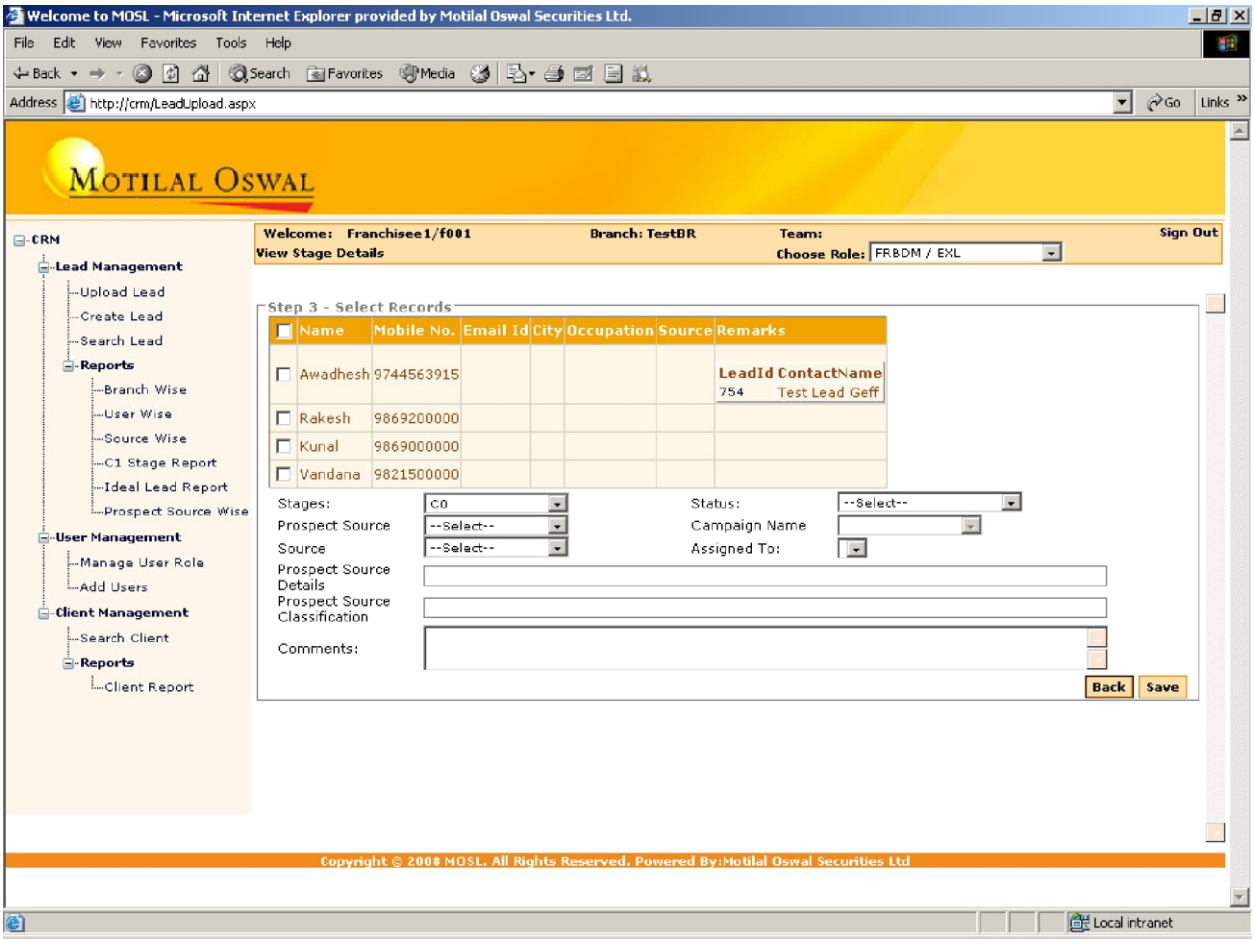
Stage, Status, Assigned To, Source, Prospect Source, Prospect Source Details are mandatory fields.

Campaign name field gets mandatory when Prospect Source is selected as "Campaign".

Prospect Source Details and Prospect Source Classification fields can be used for adding additional information about the Source. For e.g. when multiple databases are uploaded, Prospect Source Details and Prospect Source Classification are the fields to enter the database name which differentiate between databases uploaded while generating reports based on Prospect Source.

On saving, marked leads will be saved into the system and will be assigned to the respective person mentioned in Assigned To field, and unassigned leads will continue to be displayed on the screen. The user needs to ensure that all the leads uploaded are assigned to either him/her or some other user within the Franchisee / Remissier. On saving all the leads uploaded, a link to Home page is provided to go back to your home page.

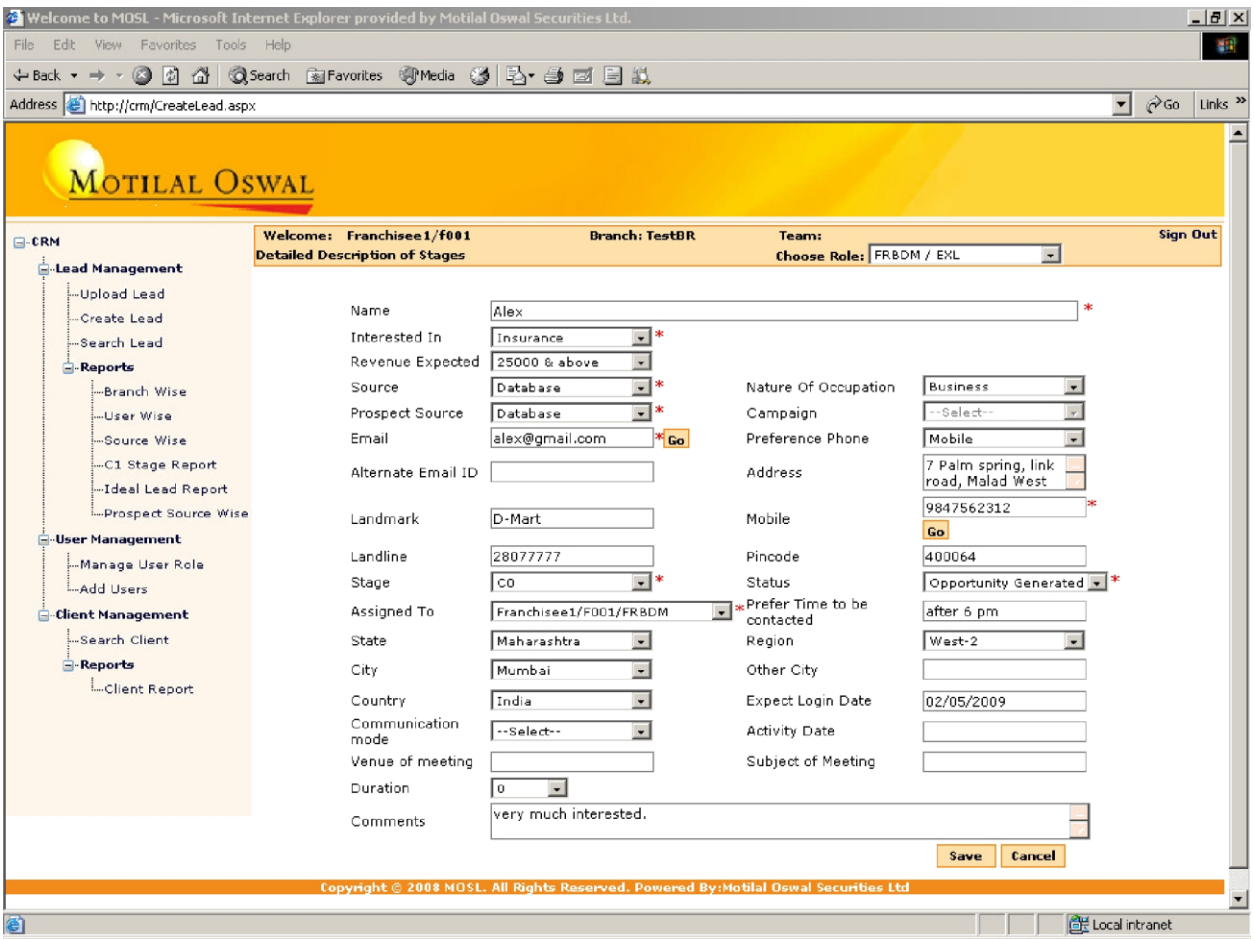
After assigning and saving the uploaded leads, a deduping mechanism runs in background which recognizes whether the lead contacts that are uploaded matches the one which were uploaded previously. If the lead contact is found to be existing lead in the system for that particular Franchisee / Remissier, it will display its lead Id and Name with a confirmation message for creating a new lead for existing lead contact in the system. To create a new lead for the existing contact in the system, the user needs to select the check box and follow the normal procedure for uploading the leads.



In the above screen, if you do not wish to create a new lead for the record for which a match was found in the system DO NOT select the check box for that lead. If you wish to create a new lead for a record for which a match is found in the system the simply tick the check box and follow the normal lead upload procedure.

3.3. *Create Lead*

This node allows you to create lead manually. Email and Mobile number are look up fields which means, by clicking on 'Go' button next to these fields after entering valid email address or mobile number, it searches for existing lead or customer in the system with same email address/mobile number. If a match is found then the lead id of belonging to that contact number is displayed. The user needs to verify whether the lead details displayed are for the same person or not. If it is for the same person then the user should abort the lead creation process. If the lead is being created for a different person but having the same contact details, then the user should proceed further and fill in rest of the details visible on the lead creation screen. For further details, please refer Deduping logic.

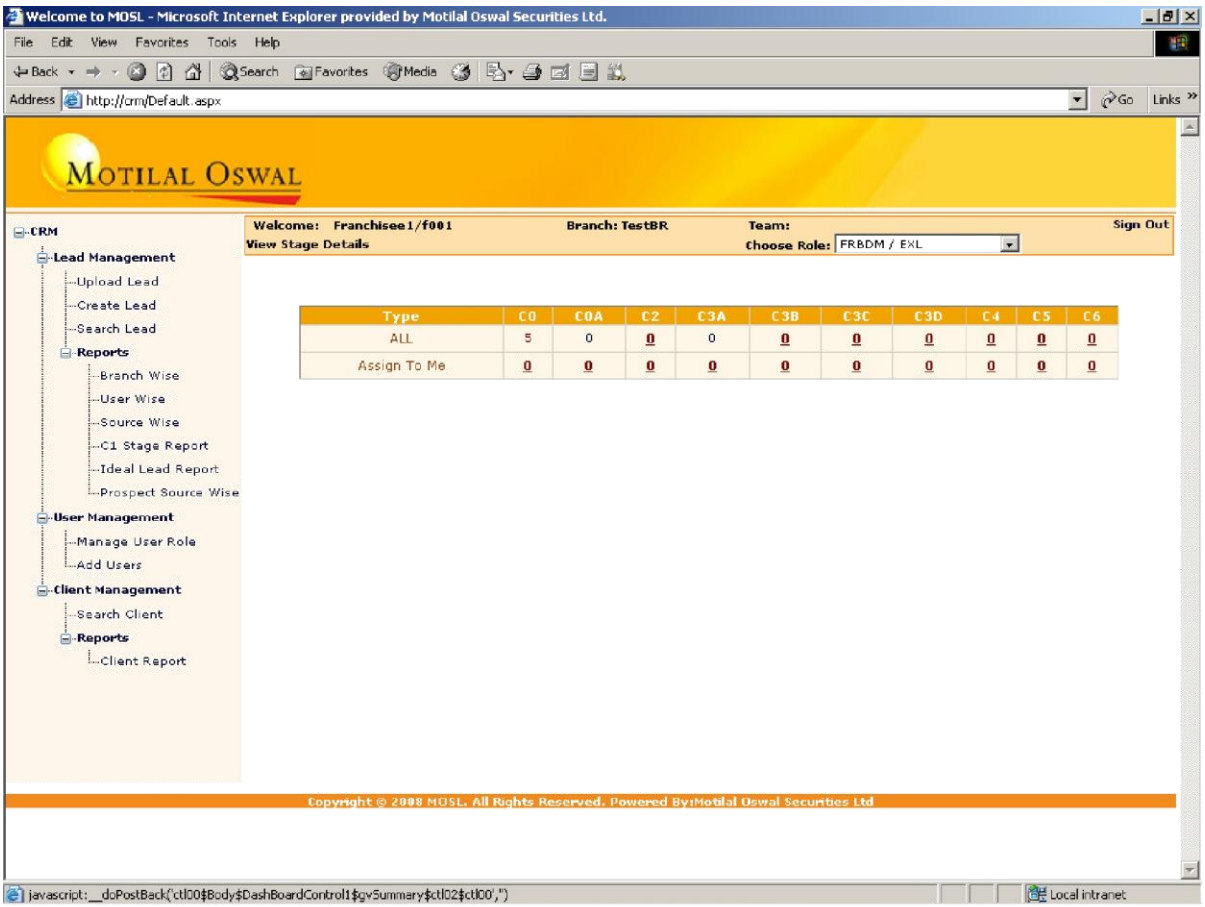


Fields marked with * indicates mandatory.

On successfully saving manually created lead, it will be assigned to the respective person, mentioned in Assigned To field.

3.4. *Managing Leads*

Now after lead uploading and lead creation, let us go back to our home page where we can view our assigned leads in their respective stages and know its process flow. Each section in a grid has a link which takes you to the list of leads in that particular stage.



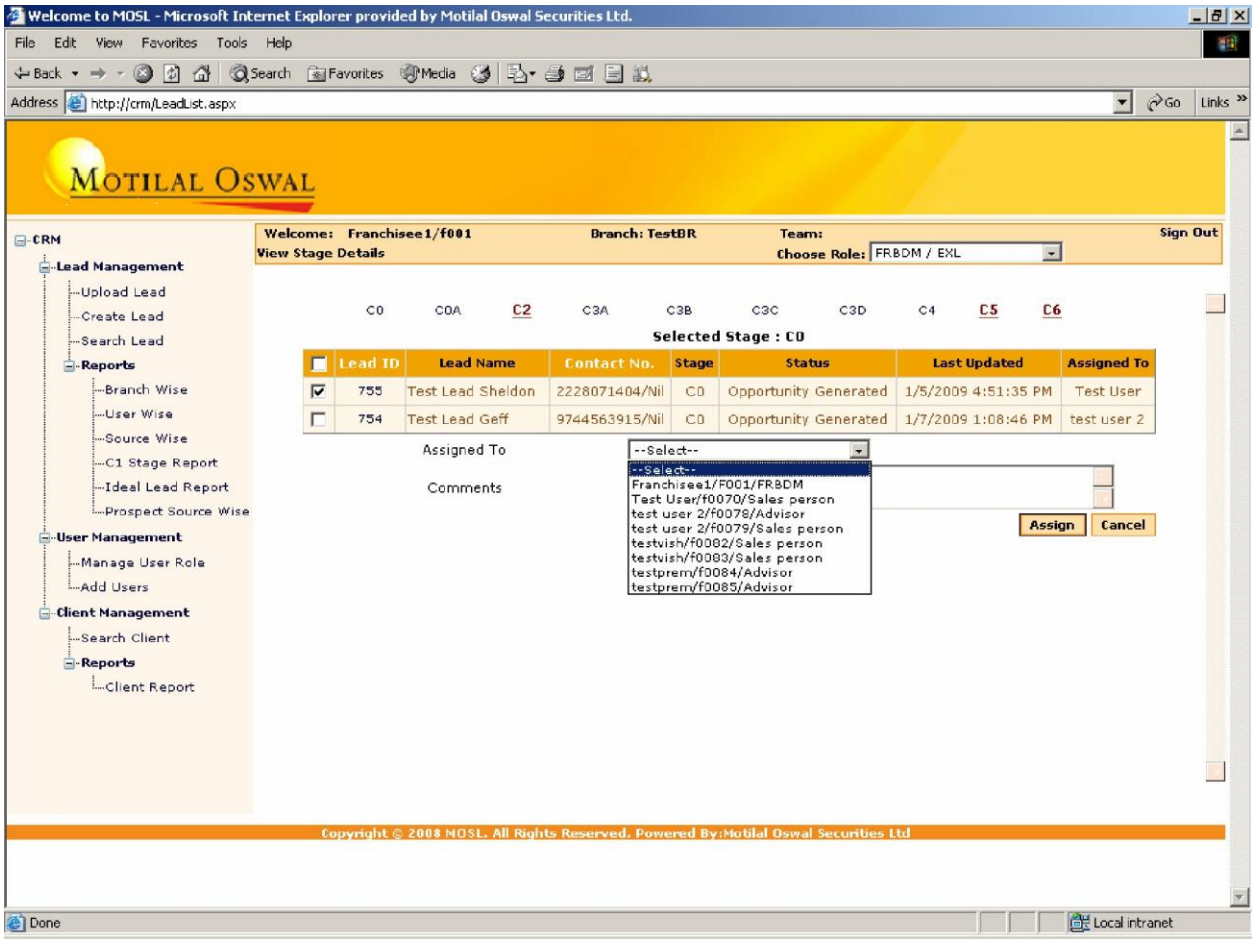
ALL rows

As we can see above, there are 5 leads in all in C0 Stage. The lead count has a hyper link which on click will navigates the user to list of leads available in C0 stage. This hyper link is accessible to owners and admin users only.

Assign To Me row

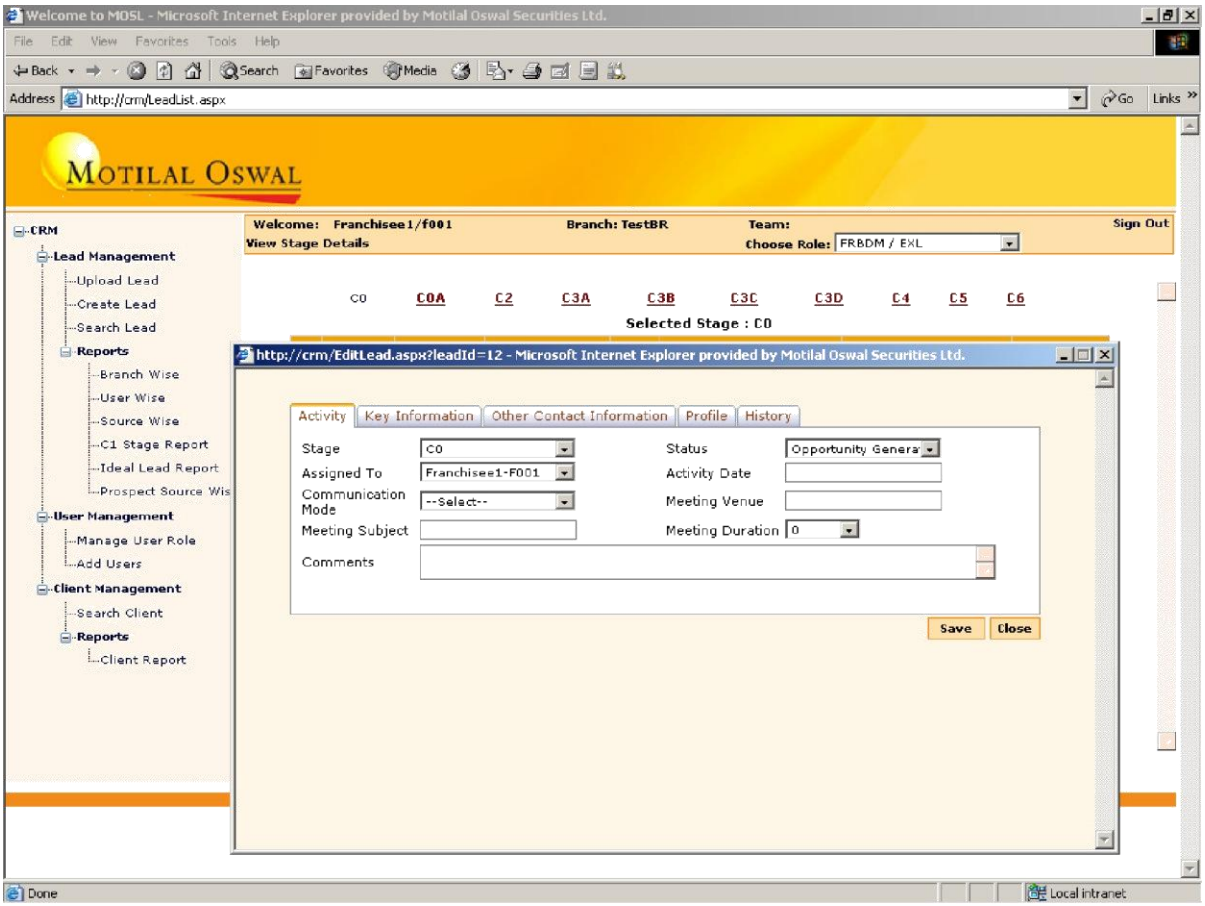
Leads assigned to the user can be viewed in the 'Assign To Me' row. The user can see list of the leads by clicking on the hyperlink in the "Assign To Me" row under the respective stages.

3.5. *Assigning Leads*



Here, assigning of leads can be done by selecting the name from the drop down list of Assigned To field. Comments are mandatory. On click on Assign button, leads will be assigned to the selected user.

Each Lead Record has a link which opens a window giving the user detailed information about the lead. The user can change the stage and status of the leads from this window and enter other relevant details of the lead like contact information, product interested in, priority of the lead etc.



Tabs related to detail information about the leads are Activity, Key Information, Other Contact Information, Profile and History tab.

Activity tab: It is used for arranging meet ups and activities with clients and displays current stage and status of lead. All key information relating to a meeting with a lead must be captured here.

Key Information tab: It displays significant information about the lead generated.

Other Contact Information tab: This tab is used for putting contact information of the client.

Profile tab: This tab is used for adding/updating client's profile.

History tab: It maintains history of activities done for that particular lead.

3.6. *Moving from one stage to other*

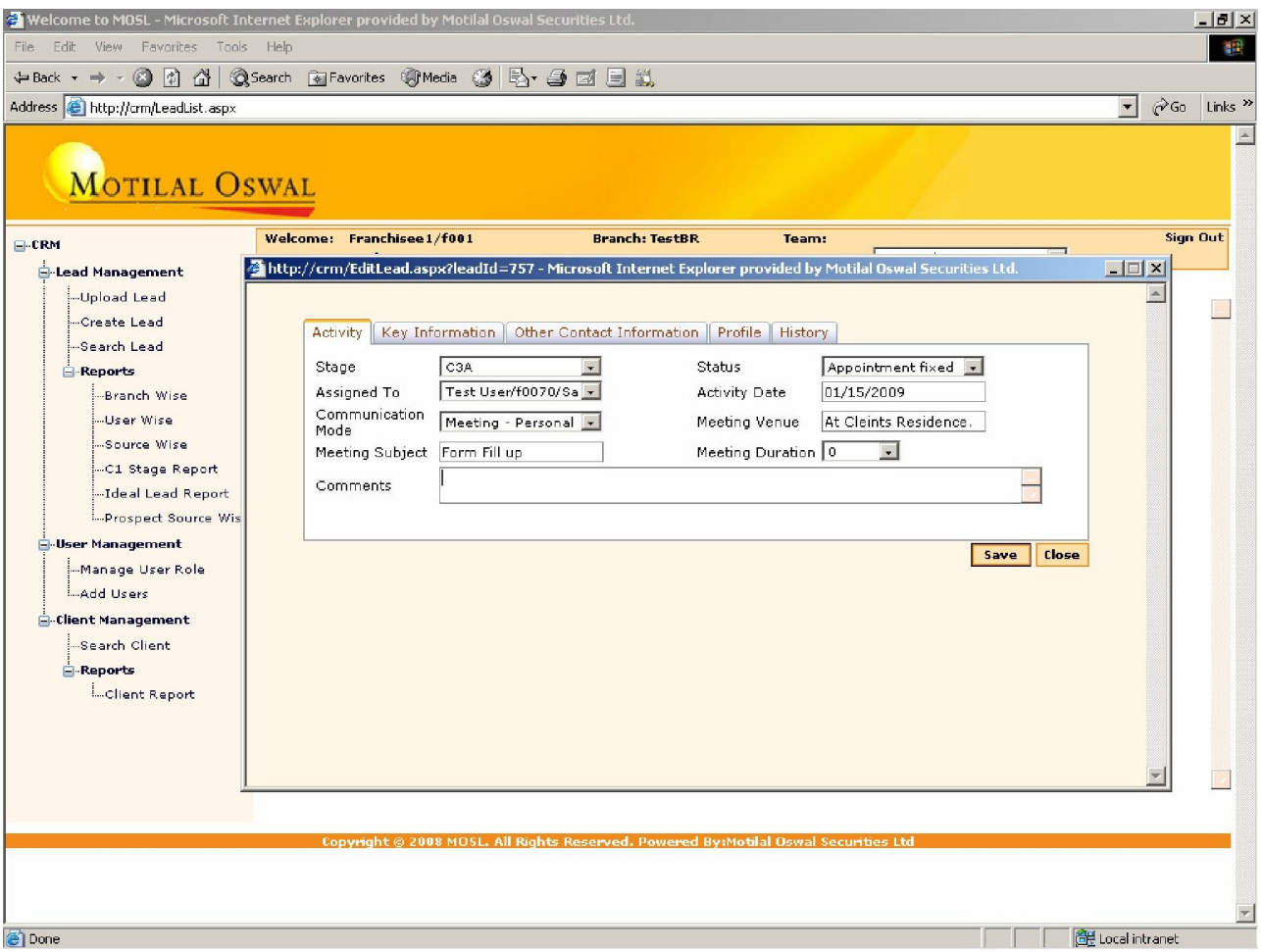
This section explains how a lead can be moved from one stage to another.

As we go to the detail page, activity tab describes stage and status of the lead. For changing the status of the current stage of the lead that it is possessing, select the appropriate status from the drop down list.

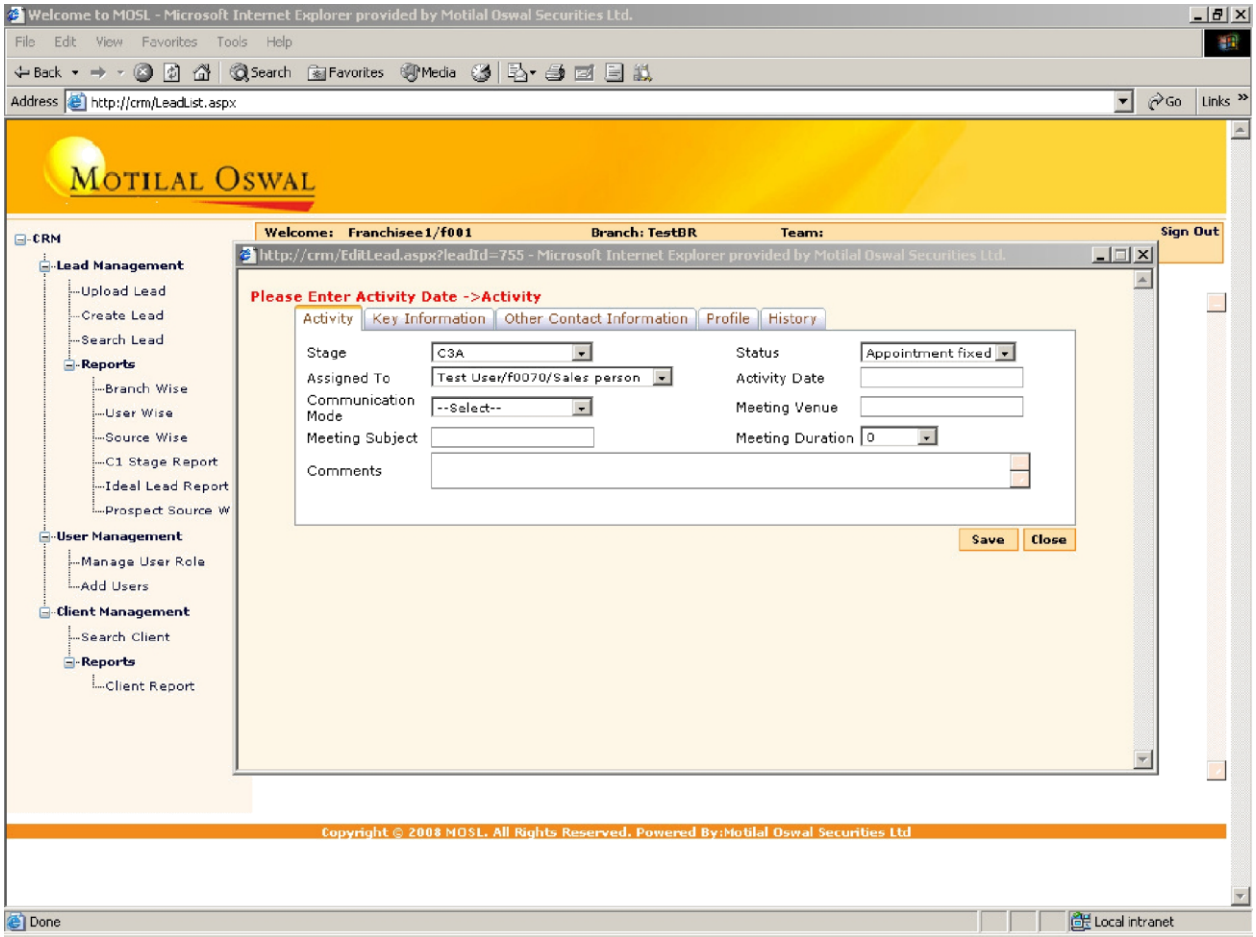
Similarly, for moving from one stage to other, select the stage and its respective status from their drop down list. If the stage is to be completed by some other user then ensure that you also assign the lead to that user.

There are few mandatory fields related which needs to be filled up before moving further to next stage/status. If those fields are not filled up, the system will prompt you to fill up those fields before it allows you to proceed further to change the stage and status. Please ensure all mandatory fields are filled up else the lead will not move to further stage.

In the below screen, a lead belonging to C0 stage is attempted to move to C3A stage and status assigned as 'Appointment fixed', which on 'Save', navigates to C3A stage.



The screen shot below is an example of the prompt given by the system when lead was attempted to move from C0 stage to C3A stage when Activity Date in Activity tab was not mentioned.

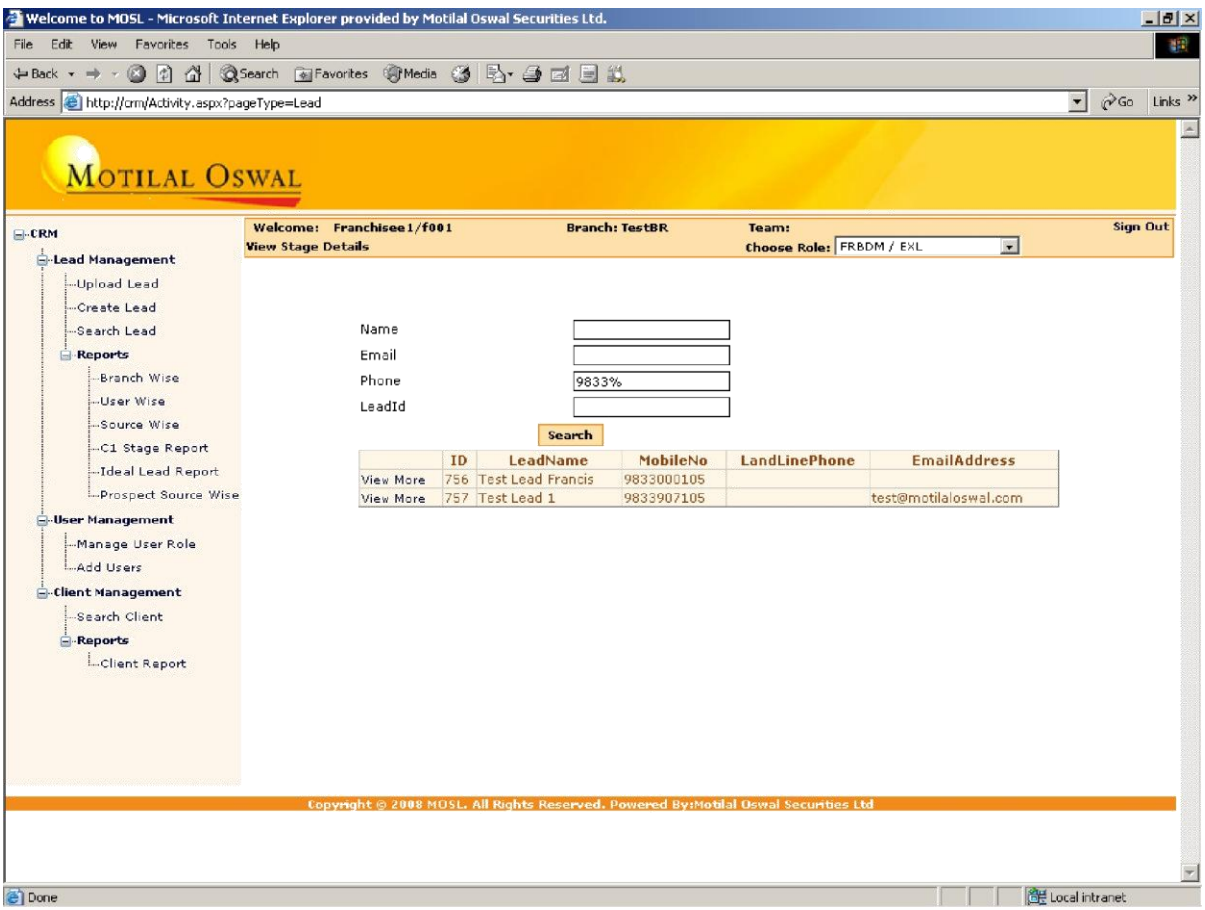


3.7. *Search Leads*

This option is made available to make a search of lead(s) based on Name, Email Address, Contact number and Lead Id.

Lead search can also be made based on pattern matching of Contact number. With the help of '%' operator pattern matching can be done.

If a search has to be made with leads having contact number starting from any particular number series, '%' operator is post fixed after the number series.



In the above screen shot, you can see that a search has been made using '%' operator for the contact numbers starting from 9833.

Search Result is displayed in grid format. Each search result record can be viewed in detail by click on 'View More' it will navigate the user to the edit window for that lead.

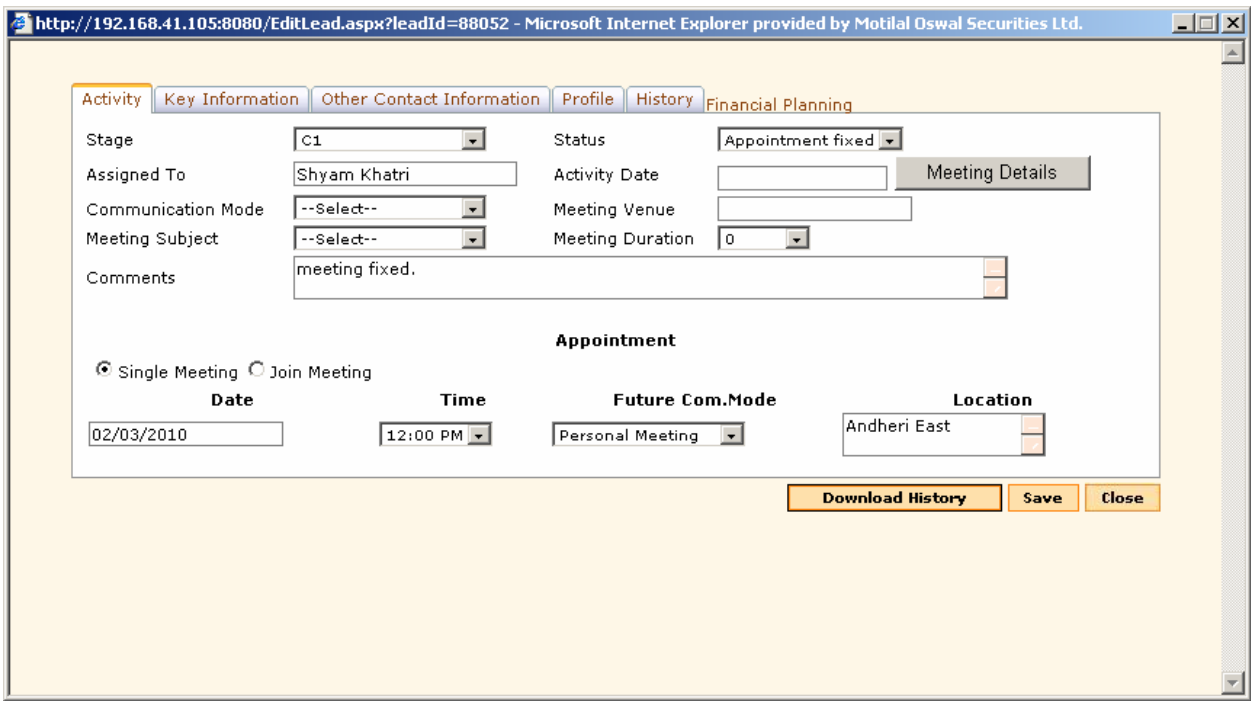
3.8. *Scheduling and updating Meetings*

Scheduling Meetings

- **Activity tab is used for scheduling meeting with leads/client and displays current stage –status of the lead.**
- **On scheduling a meeting with the lead using CRM an email and sms is sent to all the attendees regarding the scheduled meeting date, time and location.**
- **Two types of appointments can be scheduled: Single and Joint Meeting. In case of joint meetings the system provides a list of special attendee list to be taken along for the meet.**

Updating Meeting Outcome

- **Post meeting with the lead/client, the meeting outcome can be fed in 'Activity' tab. Select the scheduled meeting date in the 'Activity Date' field and click 'Meeting details'. On doing so all the meeting details attended earlier while fixing the appointment would get populated.**
- **The RM is expected to fill in the mandatory fields i.e. Communication mode, Meeting venue, meeting subject, meeting duration and comments while updating meeting outcome in 'Activity' tab.**



3.9. *Reports*

These are the types of data reports available in rows and columns format under Lead Management.

- **Branch Wise: It gives a report of the sum of leads stage wise, which is further grouped branch wise.**
- **User Wise: This report gives lead count in each stage user wise, belonging to its branch.**
- **Source Wise: On selecting the source from drop down list, a report will be generated showing the various stages the leads are in for that particular Source.**
- **Prospect Source Report: On selecting the source from drop down list, a report will be generated showing the various stages the leads are in for that particular Prospect Source.**

For every report generated, the lead count has a hyper link that provides you details in depth about the leads. The details can also be exported to excel or can be printed.

4. Deduping Logic

1. The deduping will happen on mobile number or telephone number or email id from the existing UCID database of Motilal Oswal and the lead management database.

2. The deduping from the existing lead management database will happen within the branch level of that particular Exclusive Franchisee / Remissier, as soon as prospects are uploaded or individually created in the system and will display the lead id if the lead already exists in the system. The user will be able to view the details of the lead by clicking on the lead id. The user should be allowed to create a new lead if customer shows interest in another product which is different from the previous product interest in the already existing lead.

3. The user will not be allowed to make any changes to the lead(s) unless it is assigned to him.

4. The deduping from UCID database will happen as an EOD process for bulk lead upload and for individual leads created. The next day the system will show the user a list of all leads uploaded or created the previous day that are already customers of MOSL.

5. If the system thinks it has found a customer then the possible UCID of the customer will get displayed with a link. The link should be active only if the customer belongs to the same Franchisee / Remissier else only the UCID should get displayed. The user can click on the UCID and see the details of the customer.

6. If the user identifies lead as an "Existing Customer" and belonging to his own Franchisee / Remissier, then it will be tagged as a cross selling opportunity. For cross sell opportunities, the lead will be allowed to move to any stage between C0 to C3. However from C3. From stage C3 onwards, the lead will follow normal lead management process.

7. If the user identifies lead as an "Existing Customer" however it is the customer of some other Franchisee / Remissier then the process should be stopped there itself i.e. no cross selling should be permitted and should be rejected automatically.

8. The user should be allowed to upload a database already containing the UCID of the customer. If such a database is uploaded, all records containing a UCID should be automatically be tagged as a cross sell opportunity.